

MONTHLY BUDGET

MONTH:

BUDGET GOAL:

INCOME		
DATE	SOURCE	AMOUNT
TOTAL:		

SAVINGS		
DATE	DEPOSIT	BALANCE
TOTAL:		

FIXED EXPENSES		
DATE	DESCRIPTION	AMOUNT
TOTAL:		

VARIABLE EXPENSES		
DATE	DESCRIPTION	AMOUNT
TOTAL:		

DEBT		
DATE	PAYMENT	BALANCE
TOTAL:		

SUMMARY	
TOTAL	AMOUNT
INCOME	
FIXED EXPENSES	
VARAIBLE EXPENSES	
BALANCE	
BALANCE FROWARD	

BILL CALENDAR

MONTH:

MON	TUE	WED	THU	FRI	SAT	SUN

WEEKLY CHECK-IN

MONTH:

WEEK 1	CATEGORY	BUDGET	SPENT	AMOUNT LEFT

WEEK 2	CATEGORY	BUDGET	SPENT	AMOUNT LEFT

WEEK 3	CATEGORY	BUDGET	SPENT	AMOUNT LEFT

WEEK 4	CATEGORY	BUDGET	SPENT	AMOUNT LEFT

WEEK 5	CATEGORY	BUDGET	SPENT	

SUBSCRIPTION TRACKER

[illegible]

BILL TRACKER

YEAR:

BILL:				DUE:		
	JAN	FEB	MAR	APR	MAY	JUN
PAID ON						
AMOUNT						
	JUL	AUG	SEP	OCT	NOV	DEC
PAID ON						
AMOUNT						

BILL:				DUE:		
	JAN	FEB	MAR	APR	MAY	JUN
PAID ON						
AMOUNT						
	JUL	AUG	SEP	OCT	NOV	DEC
PAID ON						
AMOUNT						

BILL:				DUE:		
	JAN	FEB	MAR	APR	MAY	JUN
PAID ON						
AMOUNT						
	JUL	AUG	SEP	OCT	NOV	DEC
PAID ON						
AMOUNT						

MONTHLY BILL TRACKER

MONTH:

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[illegible]

CONTACT LIST

NAME: _____ **PHONE:** _____

E-MAIL: _____ **MOBILE:** _____

ADDRESS: _____

NAME: _____ **PHONE:** _____

E-MAIL: _____ **MOBILE:** _____

ADDRESS: _____

NAME: _____ **PHONE:** _____

E-MAIL: _____ **MOBILE:** _____

ADDRESS: _____

NAME: _____ **PHONE:** _____

E-MAIL: _____ **MOBILE:** _____

ADDRESS: _____

NAME: _____ **PHONE:** _____

E-MAIL: _____ **MOBILE:** _____

ADDRESS: _____

SAVINGS ACCOUNT

MONTH:

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[illegible]

START BALANCE:

END BALANCE:

SAVINGS TRACKER

SAVING FOR:

GOAL AMOUNT:[illegible]

TOTAL:

PASSWORD TRACKER

WEBSITE: _____

E-MAIL: _____

USERNAME: _____

PASSWORD: _____

NOTES: _____

WEBSITE: _____

E-MAIL: _____

USERNAME: _____

PASSWORD: _____

NOTES: _____

WEBSITE: _____

E-MAIL: _____

USERNAME: _____

PASSWORD: _____

NOTES: _____

WEBSITE: _____

E-MAIL: _____

USERNAME: _____

PASSWORD: _____

NOTES: _____

WEBSITE: _____

E-MAIL: _____

USERNAME: _____

PASSWORD: _____

NOTES: _____

INCOME & EXPENSE

MONTH:

DATE	SOURCE	INCOME	AMOUNT
			TOTAL:

DATE	CATEGORY	EXPENSE	AMOUNT
			TOTAL:

TAX DEDUCTIONS

YEAR:

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[illegible]

RETIREMENT SAVINGS

YEAR:

ACCOUNT NAME:

BEGINNING BALANCE:

[illegible]

ANNUAL FINANCE SUMMARY

BEGINNING NET WORTH:	
STARTING SAVING BALANCE:	
STARTING DEBT BALANCE:	

INCOME GOAL:	
SAVING GOAL:	
DEBT PAYMENT GOAL:	

	INCOME	EXPENSES	SAVINGS	DEBTS	BALANCE
JANUARY					
FEBRUARY					
MARCH					
1st QUARTER TOTAL					
APRIL					
MAY					
JUNE					
2nd QUARTER TOTAL					
JULY					
AUGUST					
SEPTEMBER					
3rd QUARTER TOTAL					
OCTOBER					
NOVEMBER					
DECEMBER					
4th QUARTER TOTAL					
ANNUAL TOTAL					

NOTES:

DEBT PAYMENT

YEAR:

DEBT NAME:	
ACCOUNT NUMBER:	
DUE DATE:	
STARTING BALANCE:	

CREDITOR:	
INTEREST RATE:	
MINIMUM PAYMENT:	
GOAL PAYOFF DATE:	

	JAN	FEB	MAR	APR	MAY	JUN
PAID						
BALANCE						
	JUL	AUG	SEP	OCT	NOV	DEC
PAID						
BALANCE						

DEBT NAME:	
ACCOUNT NUMBER:	
DUE DATE:	
STARTING BALANCE:	

CREDITOR:	
INTEREST RATE:	
MINIMUM PAYMENT:	
GOAL PAYOFF DATE:	

	JAN	FEB	MAR	APR	MAY	JUN
PAID						
BALANCE						
	JUL	AUG	SEP	OCT	NOV	DEC
PAID						
BALANCE						

DEBT NAME:	
ACCOUNT NUMBER:	
DUE DATE:	
STARTING BALANCE:	

CREDITOR:	
INTEREST RATE:	
MINIMUM PAYMENT:	
GOAL PAYOFF DATE:	

	JAN	FEB	MAR	APR	MAY	JUN
PAID						
BALANCE						
	JUL	AUG	SEP	OCT	NOV	DEC
PAID						
BALANCE						

ANNUAL FINANCE SUMMARY

		INCOME	EXPENSES	SAVINGS	DEBTS	DONATIONS
JAN	PAYMENT					
	BALANCE					
FEB	PAYMENT					
	BALANCE					
MAR	PAYMENT					
	BALANCE					
APR	PAYMENT					
	BALANCE					
MAY	PAYMENT					
	BALANCE					
JUN	PAYMENT					
	BALANCE					
JUL	PAYMENT					
	BALANCE					
AUG	PAYMENT					
	BALANCE					
SEP	PAYMENT					
	BALANCE					
OCT	PAYMENT					
	BALANCE					
NOV	PAYMENT					
	BALANCE					
DEC	PAYMENT					
	BALANCE					

ANNUAL BUDGET

FINANCIAL GOALS

ACTION PLANS

JANUARY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

FEBRUARY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

MARCH		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

APRIL		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

MAY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

JUNE		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

JULY		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

AUGUST		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

SEPTEMBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

OCTOBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

NOVEMBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

DECEMBER		
	TARGET	ACTUAL
INCOME		
EXPENSES		
+/-		

YEARLY OVERVIEW					
TARGET INCOME		DIFFERENCE	TARGET INCOME		DIFFERENCE
TARGET EXPENSES			TARGET EXPENSES		

YEARLY BILL TRACKER

MONTH:

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[illegible]

BANK ACCOUNT INFORMATION

ACCOUNT NAME:

BANK NAME:	ACCOUNT TYPE:
ACCOUNT NUMBER:	ROUTING NUMBER:
USERNAME:	PASSWORD:
DEBIT CARD NUMBER:	PIN NUMBER:
ADDRESS:	
NOTES:	

ACCOUNT NAME:

BANK NAME:	ACCOUNT TYPE:
ACCOUNT NUMBER:	ROUTING NUMBER:
USERNAME:	PASSWORD:
DEBIT CARD NUMBER:	PIN NUMBER:
ADDRESS:	
NOTES:	

ACCOUNT NAME:

BANK NAME:	ACCOUNT TYPE:
ACCOUNT NUMBER:	ROUTING NUMBER:
USERNAME:	PASSWORD:
DEBIT CARD NUMBER:	PIN NUMBER:
ADDRESS:	
NOTES:	

FINANCIAL GOALS

:YEAR

THIS YEAR I WANT TO:

GOAL:

ACTION STEPS

MILESTONES

GOAL:

ACTION STEPS

MILESTONES

GOAL:

ACTION STEPS

MILESTONES

SAVING JAR

START DATE:

END DATE:

REASON:

FUND:

GOAL:



EMERGENCY FUND:

NO SPEND CHALLENGE

:MONTH

:START DATE

:END DATE

:GOAL

1	2	3	4
5	6	7	8
9	10	11	12
13	14	15	16
17	18	19	20
21	22	23	24
25	26	27	28
29	30	31	

REASON	NO-BUY LIST	EXEMPTIONS

INCOME TRACKER

MONTH:

[illegible]

YEAR:

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DEBT SNOWBALL

YEAR:

		DEBT 1	DEBT 2	DEBT 3	DEBT 4	DEBT 5
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
JANUARY	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
FEBRUARY	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
MARCH	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
APRIL	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
MAY	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
JUNE	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
JULY	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
AUGUST	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
SEPTEMBER	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
OCTOBER	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
NOVEMBER	PAYMENT					
	BALANCE					
DEBT NAME						
STARTING BALANCE						
MINIMUM PAYMENT						
DECEMBER	PAYMENT					
	BALANCE					

EXPENSE TRACKER

MONTH:

CATEGORY:

DATE	DESCRIPTION	AMOUNT	CARD	CASH

TOTAL:

DATE	DESCRIPTION	AMOUNT	CARD	CASH

TOTAL:

GROCERY LIST

FRUITS & VEGETABLES

MEAT & FISH

HOUSEHOLD

DRINKS

DAIRY

PANTRY

BAKERY

FROZEN

OTHER